# Merging ARIES Reports in Microsoft Excel

ARIES User Group June 2, 2011



### Merging ARIES Reports in Microsoft Excel

Today's Presentation will cover:

- Limitations to Ad Hoc report design in ARIES ReportExport
- How to merge two ARIES reports using the Excel VLOOKUP() function
- Online demo of merging a Fix-It report with a Primary Staff Person report
- Other uses of VLOOKUP() and other ways to merge reports

- When creating Ad Hoc reports in ReportExport, not all data elements are available for all reports.
- This means that some reports seem to be missing important data.
- The ARIES Help Desk often cannot meet certain report requests due to the limitations of ReportExport.
- The most often requested data element is Primary Staff Person.

 When creating an Ad Hoc report, you must start by selecting a Primary Table...

	Primary Table New Report	
Please choose a primary table	Client Table Service Line Item Table Staff Table Agency Table Next Cancel	

...then you may select Additional Tables needed for your report.

#### Additional Table

#### New Report

#### Please check the tables with data you would like to include in the report.

Address Table Agency Table Agency Specifics Table Acuity Table AIDS Defining Condition Table ART Adherence Table ART Therapy Table ART Medication Table Barriers To Care Table Care Hipp Table Care Plan Table Case Note Table CD4 Table Client Table CMP Table Contract Table

Contact Info Table Custom Data Entry Group Table Demographic Table EIP Functional Table EIP Behavioral Table EIP Psychosocial Table Eligibility Document Table OBGYN Table E Financial Table E Funding Source Table HIV Test Table Hospital Visit Table HOPWA Table Hopwa Assessment Table Hopwa Household Table Hopwa Status Table

Hopwa Worksheet Table Housing Assistance Table Immunization Table Income History Table Insurance Table Living Situation Log Table Medical Table Medicare Part D Table Medication Table Mental Health Treatment Table Needs Assessment Table Other Medication Table PAP Smear Table Pregnancy Table Program Table Referral Table

- Client Related Affected Table
- Risk Factor Table
- Site Table
- Staff Table
- SAMISS Assessment Table
- Screen Mental Health
- Screen Risk Reduction
- Screen Substance Abuse
- STI Hepatitis Table
- Substance Abuse Treatment Table
- Tuberculosis Table
- Tuberculosis Treatment Table
- TMP Table
- Viral Load Table
- Weight Table

Next

Cancel

#### When you select the <u>Client Table</u> as the Primary Table...

#### **Primary Table**



#### When you select the <u>Client Table</u> as the Primary Table...



 ...adding the Staff Table will give you the name of the <u>client's Primary</u> <u>Staff Person</u>.

When you select the <u>Service Line</u> <u>Item Table</u> as the Primary Table...

#### Primary Table

**New Report** 

Please choose a primary table



When you select the <u>Service Line</u> <u>Item Table</u> as the Primary Table...

#### **Primary Table**

**New Report** 

Please choose a primary table



 …adding the Staff Table will give you the name of the Staff Person who provided the Service.

 Most requests for Ad Hoc reports are based on clients served within a date range.



 This requires selecting the Service Line Item Table as the Primary Table, making it impossible to add a client's Primary Staff Person to such a report... UNTIL NOW!

- Using Microsoft Excel, data from two different ARIES reports can be merged into a composite report.
- The reports must both contain a Unique Client Identifier. The easiest one to use is the ARIES ID.
- The Primary Report is the most complete of the two reports. It must contain one row per client.
- The Secondary Report is a look-up table. It contains the data you want to add to the Primary Report. It also must contain one row per client.

 The ARIES "Fix-It" reports are part of OA's Data Improvement Project (DIP). Each month, we focus on a different data element.

 The "Fix-It" reports identify clients that do not meet the criteria for that month's data element so agencies can "fix" the data problems.

 The "Fix-It" report would be the *Primary Report* for merging.

#### The "Fix-It" report for Race/Ethnicity:

#### ARIES Client Hispanic Race 1 Errors Service Count Ethnicity TD 10000788 Ama, Mic T Unknown/Unreported Missing Race 1 1 Yes 10001689 9000, Hal J Yes Other Missing Race 1 3 Baker, Ria G Other 10004388 No Missing Race 1 5 10004467 White, Walter Missing Hispanic 1 W Ethnicity, Missing Race 1 10000843 Missing Hispanic Brannon, Lizzy L 1 Ethnicity, Missing Race 1 10000900 Arbitron, Art A Missing Hispanic 1 Ethnicity, Missing Race 1 10004362 Ramirez, Missing Hispanic 2 Jennifer M Ethnicity, Missing Race 1 10004377 Barrientes, Missing Hispanic 1 Ethnicity, Missing Sarah A Race 1 10004252 Client, Merge B Missing Hispanic 2 Ethnicity, Missing Race 1 1 10004154 Kilgore, Maddy **Missing Hispanic** F Ethnicity, Missing Race 1 Pacific Islander 10000262 Dang, Tom N Unknown Missing Hispanic 1 Ethnicity, 10003731 Abcdr, Jklm Unknown Black **Missing Hispanic** 3

#### Fix-It: Race and Ethnicity

All data is from the ARIES Demo Site and is fictitious. 13

Ethnicity,

- Correcting data problems on the "Fix-It" reports might be a task for the client's Primary Staff Person – but the reports do not (and cannot) include that information!
- The only way to obtain the name of the client's Primary Staff Person is to run a separate report.
- The Primary Staff Person report would be the Secondary Report for merging.

#### Ad Hoc report of Primary Staff Person:

#### **ARIES ID and Primary Staff Name**

ARIES ID	Staff Name
1000000	Matalin, Mary
1000001	Reagan, Kes
1000002	Martin, Mary
1000003	Reagan, Kes
10000004	Cooper, Joe
1000005	Matalin, Mary
10000006	Martin, Mary
1000007	Biggs, James
1000008	Cooper, Joe
1000009	Reagan, Kes
10000010	Martin, Mary
10000011	Biggs, James
10000012	Cooper, Joe
10000013	Matalin, Mary
10000014	Cooper, Joe
10000015	Biggs, James
10000016	Martin, Mary
10000017	Matalin, Mary
10000018	Cooper, Joe
10000019	Reagan, Kes
10000020	Martin, Mary
10000021	Biggs, James

#### All data is from the ARIES Demo Site and is fictitious. **15**

Excel can take an ARIES ID from the Primary Report, look it up in the Secondary Report, and retrieve the Staff Name:

#### Fix-It: Race and Ethnicity

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	
10000788	Ama, Mic T	Yes	Unknown	Missing Race 1	
10000003	000, Hal J	Yes	Other	Missing Race 1	Reagan, Kes
10004388	Baker, Ria G	No	Other	Missing Race 1	
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1	
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1	
			ARI	ES ID and Prin	ary Staff Name

ARIES ID	Sta	f Name
1000000	Mat	lin, Mary
1000001	Rea	an, Kes
1000002	Mar	th, Mary
1000003	Read	gan, Kes
10000004	<u>C00</u>	per, Joe

#### To begin, first run your Primary Report:

#### Fix-It: Race and Ethnicity

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No	Other	Missing Race 1	5
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1	1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1	1
10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race 1	1
10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race 1	2
10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race 1	1
10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race 1	2
10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race 1	1
10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3

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3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	
14	10003748	Abba, Jason R	No	White		1	
15	10003781	Abba, Mike	No	White		1	
16	10003784	Ago, Diaxx S	Yes	Black		3	
17	10001357	Abba, Shirley F	Yes	White		2	
18	10001502	Bear, Booboo B	Yes	White		1	*
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#### Next, run your Secondary Report:

#### **ARIES ID and Primary Staff Name**

ARIES ID	Staff Name
1000000	Matalin, Mary
1000001	Reagan, Kes
1000002	Martin, Mary
1000003	Reagan, Kes
10000004	Cooper, Joe
1000005	Matalin, Mary
10000006	Martin, Mary
1000007	Biggs, James
1000008	Cooper, Joe
1000009	Reagan, Kes
10000010	Martin, Mary
10000011	Biggs, James
10000012	Cooper, Joe
10000013	Matalin, Mary
10000014	Cooper, Joe
10000015	Biggs, James
10000016	Martin, Mary
10000017	Matalin, Mary
10000018	Cooper, Joe
10000019	Reagan, Kes
10000020	Martin, Mary
10000021	Biggs, James

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29     10000027 Biggs, Jamer     StaffLookup     Image: Comparison of the staff lookup       30     10000028     Image: Comparison of the staff lookup     Image: Comparison of the staff lookup       31     10000029     Image: Comparison of the staff lookup     Image: Comparison of the staff lookup       1     ARIES ID     Staff lookup     Image: Comparison of the staff lookup	28 1000026		1		
31     10000029       Identify     A       B     C       Ready     1     ARTES TD     Staff Name	29 10000027 Biggs, Jame	StaffLookup	- (	Ts Js	ARIES ID
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## On Sheet 1, first blank cell of first data row, click Function (fx) and select VLOOKUP:

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ARIES ID Client	Hispanic Ethnicity Race 1 Errors	Service Count
2 10000788 Ama, Mic T	Yes Unknown/ Unreported Missing Race 1	1
10001689 9000, Hal J	Yes Other Missing Race 1	3
4 10004388 Baker, Ria G	No Insert Function	? ×
5 10004467 White, Walter V	Type a brief description of what you want to do a	and then click
6 10000843 Brannon, Lizzy	Or select a category: Lookup & Reference	
7 10000900 Arbitron, Art A	Select a function:	
8 10004362 Ramirez, Jennife	MATCH OFFSET ROW	<u>^</u>
9 10004377 Barrientes, Sara	A ROWS RTD TRANSPOSE	
10004252 Client, Merge B	VLOOKUP VLOOKUP(lookup value.table array.col in	ex num.range lookup)
11 10004154 Kilgore, Maddy	Looks for a value in the leftmost column of a table same row from a column you specify. By default, t ascending order	, and then returns a value in the he table must be sorted in an
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	1	ARIES ID	Client		Ethnicity	Race 1	Errors	Service Count			
	2	10000788	Ama, Mic T		Yes	Unknowr Unreport	n/ ted Missing Race 1	1	42,StaffLooku	up,2,FALSE)	
	3	10001689	9000, Hal J		Yes	Other	Missing Race 1	3			
	4	10004388	Baker, Ria G	Functi	ion Argument	s.	manage fragments			8	23
	5	10004467	White, Walter V	VLO	OKUP						
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	11	10004154	Kilgore, Maddy								
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## Copy the cell containing the VLOOKUP function to the rest of the column:

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1	ARIES ID	Client	Ethnicity	Race 1	Errors	Count	
2	10000788	Ama, <mark>M</mark> ic T	Yes	Unknown/ Unreported	Missing Race 1	1	Applebaum, Amy 🚆
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang
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14	10003748	Abba, Jason R	No	White		1	Butler, Diane
15	10003781	Abba, Mike	No	White		1	Webb, Milton
16	10003784	Ago, Diaxx S	Yes	Black		3	Killoren, Eileen
17	10001357	Abba, Shirley F	Yes	White		2	Allison, Clay
18	10001502	Bear, Booboo B	Yes	White		1	0 🗸
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1	ARIES ID	Client	Ethnicity	Race 1	Errors	Count	Staff Name	
2	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1	Applebaum, Amy	
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah	
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda	
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay	
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen	
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang	
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas	
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah	
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen	
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay	
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang	
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	0	
14	10003748	Abba, Jason R	No	White		1	Butler, Diane	
15	10003781	Abba, Mike	No	Client	s without a	1	Webb, Milton	
16	10003784	Ago, Diaxx S	Ye Dr	imary	Staff Parco	3	Killoren, Eileen	
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18	10001502	Bear, Booboo B	Yes		w zero nere	1	0	
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You can move the Staff column, sort on Staff, and filter on Errors (non-blank) to list only clients needing follow-up grouped by Primary Staff Person:

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2	0	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3
3	Allison, Clay	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1
4	Allison, Clay	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1
5	Applebaum, Amy	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1
6	Brown, Deborah	10001689	9000, Hal J	Yes	Other	Missing Race 1	3
7	Brown, Deborah	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1
8	Coates, Linda	10004388	Baker, Ria G	No	Other	Missing Race 1	5
9	Killoren, Eileen	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1
10	Killoren, Eileen	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2
11	Nguyen, Quang	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1
12	Nguyen, Quang	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
13	Rankin, Thomas	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2
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#### To begin, first run your Primary Report:

#### Fix-It: Race and Ethnicity

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No	Other	Missing Race 1	5
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1	1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1	1
10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race 1	1
10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race 1	2
10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race 1	1
10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race 1	2
10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race 1	1
10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3

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1	ARIES ID	Client	Ethnicity	Race 1	Errors	Count	
2	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1	=
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	
14	10003748	Abba, Jason R	No	White		1	
15	10003781	Abba, Mike	No	White		1	
16	10003784	Ago, Diaxx S	Yes	Black		3	
17	10001357	Abba, Shirley F	Yes	White		2	
18	10001502	Bear, Booboo B	Yes	White		1	*
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#### Next, run your Secondary Report:

#### **ARIES ID and Primary Staff Name**

ARIES ID	Staff Name
1000000	Matalin, Mary
1000001	Reagan, Kes
1000002	Martin, Mary
1000003	Reagan, Kes
10000004	Cooper, Joe
1000005	Matalin, Mary
10000006	Martin, Mary
1000007	Biggs, James
1000008	Cooper, Joe
1000009	Reagan, Kes
10000010	Martin, Mary
10000011	Biggs, James
10000012	Cooper, Joe
10000013	Matalin, Mary
10000014	Cooper, Joe
10000015	Biggs, James
10000016	Martin, Mary
10000017	Matalin, Mary
10000018	Cooper, Joe
10000019	Reagan, Kes
10000020	Martin, Mary
10000021	Biggs, James

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1 ARIES ID Staff Name		
2 1000000 Matalin, Mary		
3 10000001		
4 1000002	Not all clients in	
5 1000003 <u>Reagan, Kes</u>		
6 1000004	this compledate	
	this sample data	
8 1000006 Martin, Mary		
10 1000000	have a Primary	
11 10000009		
12 10000010 Martin Mary	Staff Person	
13 10000011	Starr crooth	
14 10000012 Cooper, Joe		
15 10000013		
16 10000014 Cooper, Joe		
17 10000015		
18 10000016		
19 10000017 Matalin, Mary		
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21 10000019		
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23 10000021 Biggs, James		
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28 10000026		
29 10000027 Biggs, James		
30 10000028		
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3 100000 1				
4 1000000				
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8 1000006 artin, Mary				
9 1000007				
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30 10000028	· · ·		•	
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## On Sheet 1, first blank cell of first data row, click Function (fx) and select VLOOKUP:

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ARIES ID Client	Ethnicity         Race 1         Errors         Count           Yes         Unknown/ Unreported         Missing Race 1         1						
3 10001689 9000, Hal J	Yes Other Missing Race 1 3						
4 10004388 Baker, Ria G	No Insert Function	? <u>×</u>					
5 10004467 White, Walter V	Search for a function: Type a brief description of what you want to do and then dick	Go					
6 10000843 Brannon, Lizzy	Or select a category: Lookup & Reference						
10000900 Arbitron, Art A	Select a function:						
8 10004362 Ramirez, Jennife	MATCH OFFSET ROW	<b>^</b>					
9 10004377 Barrientes, Sara	n A ROWS RTD TRANSPOSE	=					
10004252 Client, Merge B	VLOOKUP VLOOKUP(lookup_value,table_array,col_index_num,range	_lookup)					
11 10004154 Kilgore, Maddy	Looks for a value in the leftmost column of a table, and then returns same row from a column you specify. By default, the table must be s ascending order.	Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.					
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	5 1	0004467	White, Walter V	VLO	OKUP										
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	7 1	0000900	Arbitron, Art A		Col_in	dex_num	2				= 2				
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1	10	.0004252	Client, Merge B												
1	11 1	0004154	Kilgore, Maddy												
1	12 1	0000262	Dang, Tom N	Formu	ula result = Ap	plebaum, Am	у					_			
1	13 1	.0003731	Abcdr, Jklm	Help	on this function		-			+	_		UK	Can	
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2	10000788	Ama, <mark>M</mark> ic T	Yes	Unknown/ Unreported	Missing Race 1	1	Applebaum, Amy 📃	
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah	
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda	
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay	
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen	
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang	
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas	
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah	
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen	
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay	
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang	
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15	10003781	Abba, Mike	No	White		1	Webb, Milton	
16	10003784	Ago, Diaxx S	Yes	Black		3	Killoren, Eileen	
17	10001357	Abba, Shirley F	Yes	White		2	Allison, Clay	
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3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
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9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
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You can move the Staff column, sort on Staff, and filter on Errors (non-blank) to list only clients needing follow-up grouped by Primary Staff Person:

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4	Allison, Clay	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1
5	Applebaum, Amy	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1
6	Brown, Deborah	10001689	9000, Hal J	Yes	Other	Missing Race 1	3
7	Brown, Deborah	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1
8	Coates, Linda	10004388	Baker, Ria G	No	Other	Missing Race 1	5
9	Killoren, Eileen	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1
10	Killoren, Eileen	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2
11	Nguyen, Quang	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1
12	Nguyen, Quang	10000262	Dang, Tom N	Un <mark>know</mark> n	Pacific Islander	Missing Hispanic Ethnicity,	1
13	Rankin, Thomas	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2
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## **Final Thoughts**

 The ExcelVLOOKUP() function can be used for other purposes:

Staff Person who entered a Service
 Agency holding an Eligibility Doc
 Staff Person who did an Assessment

 Microsoft Access can also merge data from two reports:

Export each report as XML file
Import first file, rename temp table
Import second file, rename temp table
Create query, joining on ARIES ID

## **Final Thoughts**

- The ARIES Help Desk can assist with report design of Primary and Secondary reports for merging.
- The ARIES Help Desk <u>cannot</u> provide detailed assistance with Microsoft Excel.

#### ARIES Help Desk 866-411-ARIES (2743)

